

FIG. 1

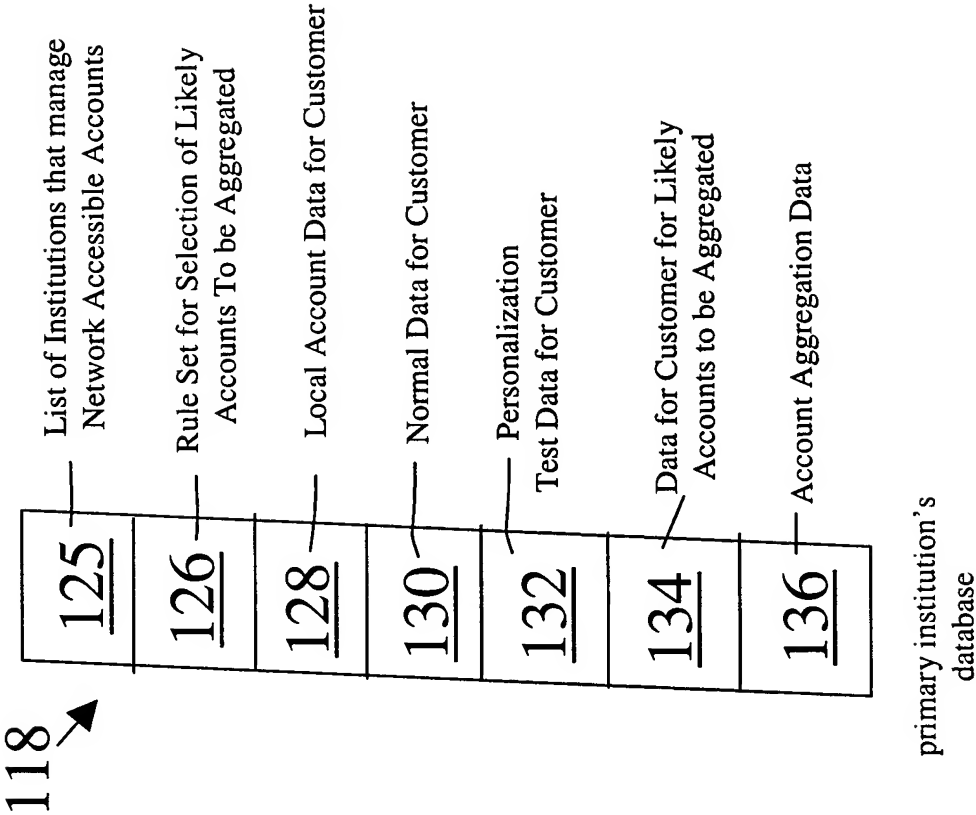


FIG. 1A

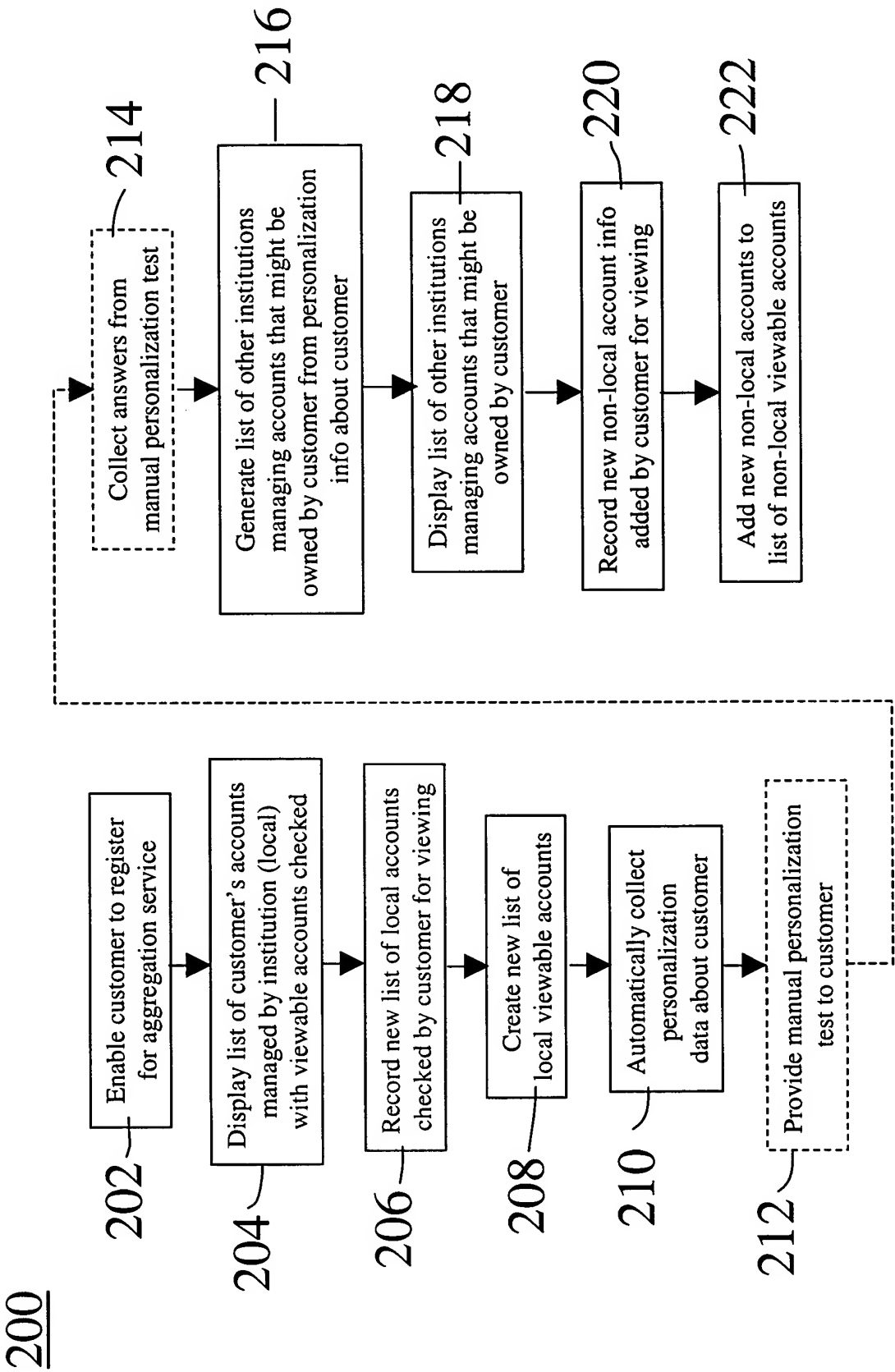


FIG. 2

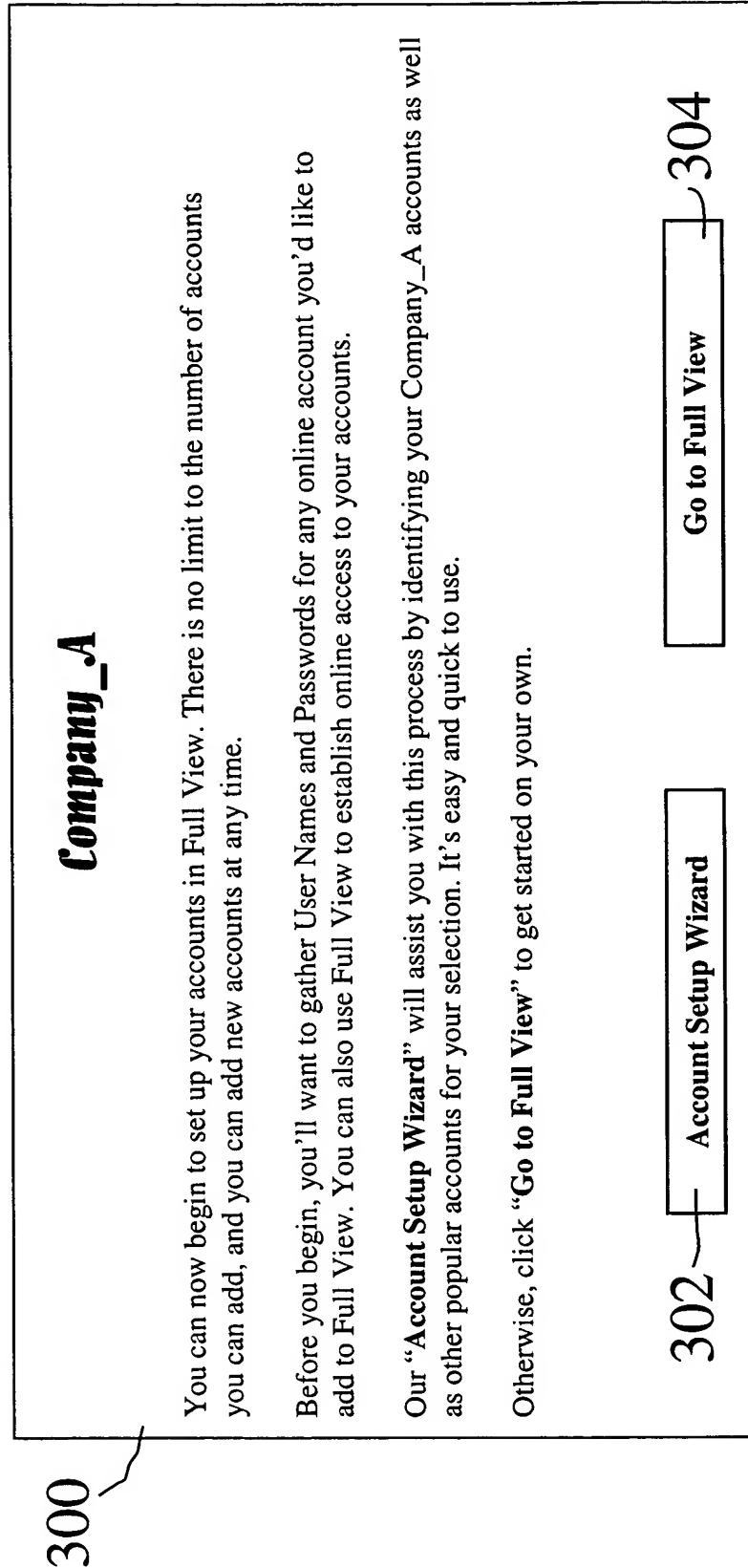


FIG. 3

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ACCOUNT SETUP WIZARD

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Step 1: Company_A Investment Accounts....

Please select the Company_A accounts you wish to add to Full View:

☐ Company_A Personal Investing

☐ Acct: Y012345601

☐ Acct: T131313112

☐ Acct: ABCI12345

Company_A NetBenefits

☐ Acct: Profit Sharing -81111

Company_A Charitable Gift Fund

☐ Acct: CGF136348

☐ Company_A Bill Pay

\$20,451.00

\$ 5,024.14

\$ 2,025.46

\$10,250.00

\$ 340.24

Go to Full View

Continue with Wizard

FIG. 4

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Step 2: Other Accounts....
Please select the accounts you wish to add to Full View:

☐ Financial_A

☒ Financial_B

☐ Financial_C

☐ Bank_A

☒ Bank_B Online

☐ Bank_C

☐ Creditcard_A

☒ Creditcard_B

☐ Airline_A Miles

☐ Email_A

Continue with Wizard

Go to Full View

FIG. 5

ACCOUNT SETUP WIZARD

Step 2a: Other Investment Accounts.....
Please select the investment accounts you wish to add to Full View:

☒ Financial_A
☐ Financial_B
☐ Financial_C
☐ Broker_A
☐ Bank_A Investments
☐ Broker_B

Continue with Wizard **Go to Full View**

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FIG. 6

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ACCOUNT SETUP WIZARD

Step 2b: Other Financial Accounts.....

Please select the accounts you wish to add to Full View:

☐ Bank_A

☒ Bank_B Online

☐ Bank_C

☒ Credit_Card_A

☐ Credit_Card_B

☒ Credit_Card_C

☐ Credit_Card_D

Continue with Wizard

Go to Full View

FIG. 7

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ACCOUNT SETUP WIZARD

Step 2c: Other Accounts....

Please select the investment accounts you wish to add to Full View:

☒ Airlines_A Miles

☐ Airlines_B Miles

☐ Airlines_C Miles

☐ Email_A

☐ Email_B

Finish Wizard

FIG. 8

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Add a New Account

322

Add a New Account

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Add a New Account

Sign In Information

If you have online access to your account at Bank_A Online, please enter your sign-in information exactly as you would at their Web site.

Bank_A Online User ID:

Bank_A Online Authentication:

Verify Authentication:

If you have an account at Bank_A Online but do not have on-line access, click here.

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FIG. 9